BEIS Public Attitudes Tracker (June 2020, Wave 34, UK)
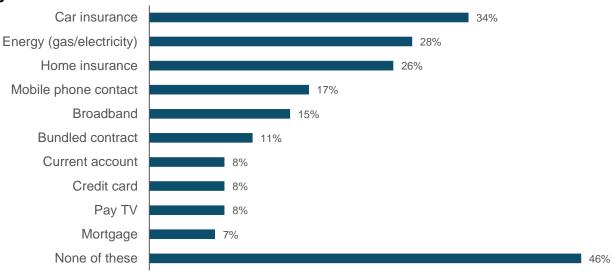
6th August 2020   **Official Statistics**

As well as the quarterly questions on Net Zero, renewable energy, fracking and climate change, the June 2020 wave of the tracker covered other topics including consumer issues and artificial intelligence. In June 2020:

- When making purchases, people were most likely to have switched provider or contract for car insurance (34%), energy (28%) and home insurance (26%) (Figure 1).

- Three in ten (28%) people said they were positive about AI, while two in ten (20%) said they were negative.

- Eight in ten people (81%) said they were either very concerned (35%) or fairly concerned (46%) about climate change.

Figure 1: Whether switched provider or contract for products or services in the last 12 months (among those responsible for purchasing each product and service), June 2020*

Car insurance	34%
Energy (gas/electricity)	28%
Home insurance	26%
Mobile phone contact	17%
Broadband	15%
Bundled contract	11%
Current account	8%
Credit card	8%
Pay TV	8%
Mortgage	7%
None of these	46%

Please refer to Figure 14 for base size and question details.

What you need to know about these statistics:

Following the outbreak of Covid-19, face-to-face fieldwork was suspended halfway through the March wave of the tracker (wave 33). A further wave of fieldwork for March (wave 33) was therefore collected via the Kantar online omnibus survey, and fieldwork for June (wave 34) was collected via the same method. This report presents results for June together with data collected online in March for the quarterly questions included in both waves. These online results should not be compared with face-to-face results from previous waves due to selection and measurement effects. See the Technical Notes for details.

Contents

Executive summary

The key findings for the June 2020 wave of the tracker are presented below. Please note that all questions are based on data collected via Kantar's online omnibus in June 2020. **Results are not comparable with earlier face-to-face waves**.

Net Zero

- The proportion of people who had any awareness of the concept of Net Zero was 63%.

Climate change

- Eight in ten (81%) of the public said they were either very concerned (35%) or fairly concerned (46%) about climate change.

Renewables

- The proportion of people who supported renewable energy was 80%. Only 2% opposed renewable energy.

Shale gas

- The proportion of people who had any awareness of fracking was 89%.

- Just over a third (36%) of all people questioned opposed fracking.

Shopping around

- The products most commonly taken out during the previous 12 months were car insurance (48%) and home insurance (42%), with the public most likely to have shopped around for car insurance (41%), home insurance (33%) and energy (28%).

- The most common reason why people did not shop around was because the offer from the current provider was just what they wanted (45%).

Switching

- Among those responsible for purchasing various products or services, people were most likely to have switched provider or contract for car insurance (34%), energy (28%) and home insurance (26%).

- Only 10% of people experienced problems during the switching process once they selected a new provider or contract.

Consumer rights

- 85% of people had purchased from a website with multiple sellers (e.g. eBay, Amazon) in the last 12 months, and over half (56%) had purchased from a single retailer website.

Consumer protection

- The public were more likely to feel that they were offered better protection in terms of their consumer rights when buying from a store on the high street (13%), than when

buying from the website of a high street retailer (9%). One third (33%) felt there was no difference.

Consumer dispute resolution services

- Two thirds (66%) were aware of consumer dispute resolution services. Those in older age groups were more likely to be aware than those in younger age groups (at least 75% of those aged 55 and over, compared with 40% of those aged 16 to 24).

Consumer problems

- Just under a quarter (24%) had experienced a problem with a provider in the last 12 months. Problems were most commonly experienced with retail or shopping providers (6%), energy providers (5%), holiday companies or airlines (5%), and broadband providers (5%).

Trust in consumer organisations

- Levels of trust (either a lot or a fair amount) were highest for Citizens Advice (81%), followed by Trading Standards (79%) and consumer groups (79%).

- Levels of trust were lowest for energy suppliers. Four in ten (41%) people trusted energy suppliers a lot or a fair amount but almost half (48%) said they did not trust them very much or did not trust them at all.

Artificial intelligence

- Nine in ten people (89%) said they had heard of artificial intelligence (AI) with 8% having never previously heard of this.

- Over half (55%) said they were interested in AI, with 5% saying that they will actively seek out information about future developments and 17% that they will take an interest in news stories or articles about future developments.

Introduction

The Public Attitudes Tracker (PAT) survey covers public attitudes towards Department for Business, Energy and Industrial Strategy (BEIS) policies such as energy, climate change, consumer rights, artificial intelligence and workers' rights. The survey began in March 2012 and runs four times a year. Questions on issues where attitudes are expected to shift more quickly or to be affected by seasonal changes are repeated quarterly; other questions are asked annually. The tracker is regularly reviewed to ensure that the data continue to offer valuable insight.

Until March 2020 (wave 33) the survey was conducted using in-home interviews conducted via the Kantar UK face-to-face Omnibus. However, fieldwork in March 2020 stopped early due to the outbreak of Coronavirus (COVID-19) in the UK, and the associated lockdown measures. The findings from wave 33, based on a truncated face-to-face sample, were published in May 2020.[1] A parallel version of wave 33 was also conducted by web on the Kantar online omnibus. The purpose of this was to test and compare alternative methodologies with a view to deciding on the best approach for future waves, while lockdown restrictions remain in place.

At the point of publication, face-to-face survey fieldwork largely remains paused in the UK. Therefore, data for wave 34 were also collected using the Kantar online omnibus. Fieldwork ran from 4 June and 9 June with a representative sample of 4,011 adults (16 and over) in the UK.

This report provides selected headline findings and highlights statistically significant differences at the 95% level for questions which were asked on both of the two waves where the Kantar online omnibus was used:

- Wave 34 (June 2020)

- Wave 33 (March 2020)

Statistically significant differences at the 95% level are also made between subgroups for wave 34.

It should be noted that any change in methodology can lead to both selection effects (that is differences due to the different sampling methods employed) and measurement effects (that is differences due to the different interview modes). Although attempts have been made to reduce the selection effects between the online and face-to-face approaches (see Technical Notes), the **CAWI[2] results from wave 34 and wave 33 should not be directly compared with face-to-face results from previous waves**. For this reason, we have not made any direct comparisons with longer-term tracking measures collected via the original face-to-face surveys.

It should also be noted that fieldwork for the two online waves took place during the COVID-19 lockdown period. It is unclear what effect the COVID-19 outbreak and associated media coverage during fieldwork may have had on public behaviours, attitudes and perceptions

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[1] The March 2020 (wave 33) report can be found here:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/884028/BEIS_PAT_W33_-_Key_findings_Final_.pdf
[2] Computer-assisted web interviewing

towards the topics in this report. This is a further reason why comparisons with earlier face-to-face waves should be avoided.

The factors described above should be taken into consideration when interpreting these results.

Further information on the methodology used and the steps taken to minimise the risk of sample bias and adapt the questionnaire for CAWI can be found in the Technical Notes.

Alongside this report we have also provided PDF crosstabulations for the current wave.[3] This includes demographic and key question sub-group comparisons for all questions. These are also available in Excel.

The wave 34 questionnaire covered the following topics:

- Net Zero

- Climate change

- Renewables

- Shale gas

- Shopping around

- Switching

- Consumer rights

- Consumer protection

- Consumer dispute resolution services

- Consumer problems

- Trust in consumer organisations

- Artificial intelligence

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[3] This data is available for wave 33, upon request.

Headline findings

In this report all findings are based on the online survey version of wave 34 and findings are compared with the online version of wave 33 for questions which were asked in both waves. Topics asked in both waves include:

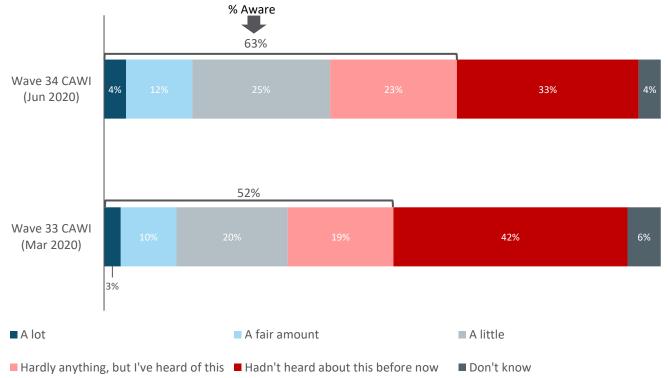- Net Zero

- Renewables

- Shale gas

- Climate change

Comparisons with earlier waves conducted using face-to-face methods should be avoided as the results are not fully compatible (see Introduction and Technical Notes).

Net Zero

In June 2019 the government announced a new target which will require the UK to bring all greenhouse gas emissions to Net Zero by 2050. A new question was introduced to the tracker in March 2020 to understand the public's awareness of the concept of Net Zero.

In June 2020, 63% of the public were aware of the concept of Net Zero, an increase from 52% when this question was asked online in March 2020 (Figure 2). Although most of the public in June 2020 said they were aware of Net Zero, only 4% said they knew a lot about it. A further 12% said they knew a little, and 25% a fair amount. Just under one in four (23%) had only heard of it.

Figure 2: Awareness of the concept of "Net Zero" (based on all people), March 2020 to June 2020*

Q220. The Government promotes the concept of 'Net Zero'. Before today, how much, if anything, did you know about this concept?

Base: All wave respondents – March 2020 (2,544); June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Men (75%, compared with 52% of women) and those in social grades AB (74%, compared with 54% of those in social grades DE) were most likely to have had at least some awareness of Net Zero (Table 8; Figure 3).

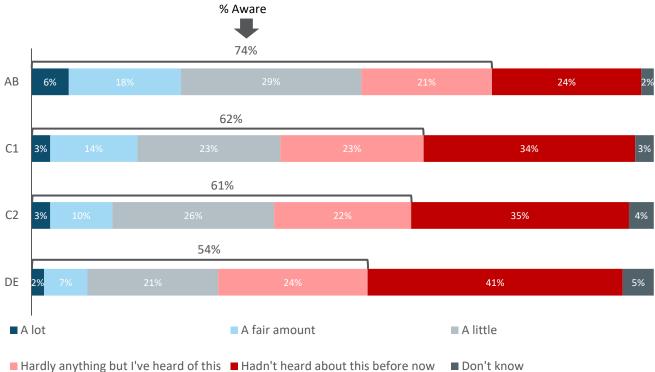**Figure 3: Awareness of the concept of "Net Zero" (based on all people), by social grade, June 2020***

Q220. The Government promotes the concept of 'Net Zero'. Before today, how much, if anything, did you know about this concept?

Base: All wave respondents (June 2020) – AB (1259); C1 (1212); C2 (652); DE (888).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical notes).

Climate change

In June 2020, 81% of the public reported some level of concern about climate change, an increase from 78% in March 2020 when the question was also asked online (Figure 4). Women (85%, compared with 77% of men) and those in social grades AB (85%, compared with 78% of those in social grades DE) were more likely to say they were concerned (Table 7).

Figure 4: Concern about climate change (based on all people), March 2020 to June 2020*

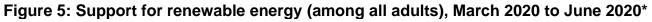Q21. How concerned, if at all, are you about current climate change, sometimes referred to as 'global warming'?

Base: All wave respondents – March 2020 (2,544); June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Energy infrastructure

Renewables

In June 2020, 80% of the public expressed support for renewable energy, with 44% strongly supporting it. Only 2% said they opposed renewable energy (Figure 5).

Figure 5: Support for renewable energy (among all adults), March 2020 to June 2020*

Q3) The next question is about renewable energy. This covers a number of different forms, including wind power, solar energy and biomass. Do you support or oppose the use of renewable energy for providing our electricity, fuel and heat?

Base: All wave respondents – March 2020 (2,544); June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Levels of support for renewables varied by social grade, with those in social grades AB more likely to support renewable energy than those in social grades DE (86% versus 73%). Support was also higher among those who were concerned about climate change (86%, compared with 58% who were not concerned about climate change) (Table 1).

Shale gas

In June 2020, the majority of the public (89%) said they had some awareness of hydraulic fracturing for shale gas, otherwise known as 'fracking' (Figure 6). One in ten (11%) said they knew a lot about fracking, with just over half (54%) saying they knew a little. One in ten (11%) had never heard of fracking. These findings are consistent with those observed in March 2020 via the wave 33 online survey.

Figure 6: Awareness of fracking (based on all adults), March 2020 to June 2020*

Q15a. Before today, how much, if anything did you know about hydraulic fracturing for shale gas, otherwise known as 'fracking'?
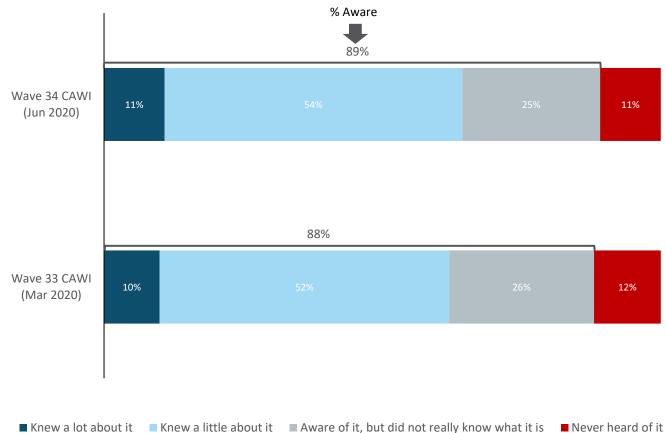
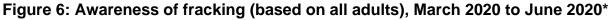Base: All wave respondents – March 2020 (2,544); June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

People in older age groups were more aware of fracking than people in younger age groups, with 98% of those aged 65 and over aware of fracking compared with 79% of those aged 16 to 24 (Figure 7). Those in social grades AB were also more likely to be aware of fracking (93%, compared with 86% of those in grades DE) (Table 2).

Figure 7: Awareness of fracking (based on all adults), by age, June 2020*

Q15a. Before today, how much, if anything did you know about hydraulic fracturing for shale gas, otherwise known as 'fracking'?

Base: All wave respondents (June 2020) – 16-24 (572); 25-34 (703); 35-44 (653); 45-54 (706); 55-64 (628); 65+ (749).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

In June 2020, a quarter of the public (25%) supported fracking, an increase from 19% in March 2020 (Figure 8). Opposition to fracking fell from 42% in March 2020 to 36% in June 2020. The proportion reporting that they neither supported nor opposed fracking remained consistent at 28%.

Figure 8: Support for fracking (based on all people), March 2020 to June 2020*

■ Strongly support ■ Support ■ Neither support nor oppose ■ Oppose ■ Strongly Oppose ■ Don't know

Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

Base: All wave respondents – March 2020 (2,544); June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Younger age groups were less likely to oppose fracking than older age groups. Just under three in ten (28%) of those aged 16 to 24 opposed fracking, compared with 48% of those aged 55 to 64 and 37% of those aged 65 and over. The proportion saying that they neither supported nor opposed fracking was broadly consistent across all age groups (Figure 9).

Figure 9: Support for fracking (based on all adults), by age, June 2020*

Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

Base: All wave respondents (June 2020) – 16-24 (572); 25-34 (703); 35-44 (653); 45-54 (706); 55-64 (628); 65+ (749).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

People were asked why they supported or opposed fracking.[4] In June 2020, the most common reasons for supporting fracking were: the need to use all available energy sources (55%); reducing the dependence on fossil fuels (52%); and reducing the dependence on other countries for the UK's energy supply (52%) (Table 4). The main reasons for opposing fracking were: the loss and destruction of the natural environment (63%); and concern about the risk of earthquakes (59%) (Table 5). The main reason for neither supporting nor opposing fracking was not knowing enough about it (47%) (Table 6).

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[4] The questions are asked spontaneously when the survey is conducted using a face-to-face approach, whereas an answer list was presented to respondents for the online survey.
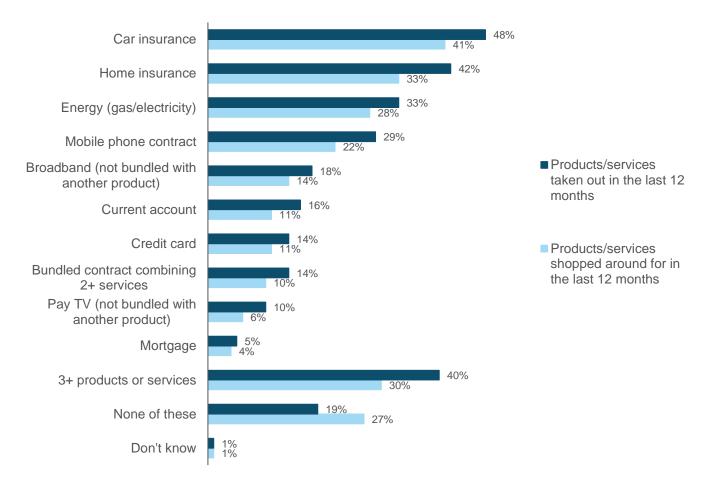
Consumer markets

Shopping around

How people shop around

In June 2020, the public were asked if they had taken out a range of different products and services in the last 12 months. The products most commonly taken out were car insurance (48%), home insurance (42%), energy (33%) and a mobile phone contract (29%) (Figure 10). The products least commonly taken out were a mortgage (5%) and pay TV (10%). Four in ten (40%) had taken out three or more products in the last 12 months, while two in ten (19%) had not taken any out any products and services.

Figure 10: Products and services taken out and shopped around for in the last 12 months (based on all people), June 2020*

Q90. Which of these products or services have you taken out in the last 12 months? This includes making a new purchase, switching providers, upgrading or renewing existing deals. / Q91. Which, if any, of these products or services have you personally shopped around for in the last 12 months? Please include shopping around you did online, by telephone, or in person.

Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

The public were also asked if they had personally shopped around for these same products and services in the last 12 months (Figure 10). Consistent with the findings above, people were most likely to have shopped around for car insurance (41%), followed by home insurance (33%) and energy (28%). They were least likely to have shopped around for a mortgage (4%) and pay TV (6%). Three in ten (30%) had shopped around for three or more products and services in the last 12 months, while 27% had not shopped around for any products and services.
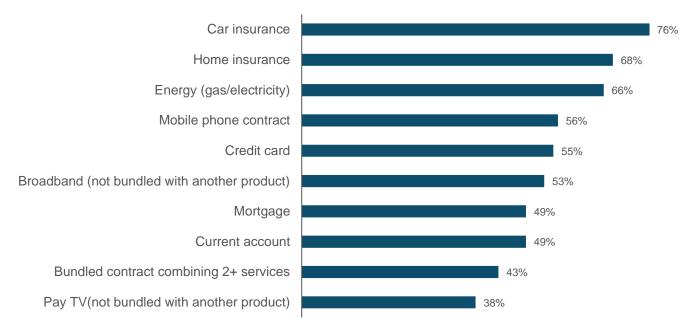
Those more likely to shop around for three or more products included those in social grades AB (39%, compared with 19% of those in social grades DE) and home owners (33%, compared with 27% of private renters and 17% of social renters) (Table 9 and 10).

To provide an indication of the proportion of the public who shop around <u>before</u> making a purchase, Figure 11 shows the proportion who shopped around for each product or service based only on those who took out this product and service in the last 12 months[5].

This shows that shopping around for products taken out in the last year was most common for car insurance (76%), home insurance (68%) and energy (66%), and at least common for Pay TV (38%) and bundled contracts (43%).

There are some notable differences in the proportions of people who shop around for different products and services when comparing the data in Figures 10 and 11. These differences largely relate to how frequently products or services are taken out. For example, only 5% of people had shopped around for mortgages in the last 12 months (Figure 10), suggesting that this is a rare activity at an overall level. However, Figure 11 shows that 49% of people who had taken out a mortgage in the last 12 months had shopped around for one beforehand.

Figure 11: Whether shopped around for product or service based on those who have taken out each product or service in the last 12 months (based on those who took out each product), June 2020*

Q90. Which of these products or services have you taken out in the last 12 months? This includes making a new purchase, switching providers, upgrading or renewing existing deals. / Q91. Which, if any, of these products or services have you personally shopped around for in the last 12 months? Please include shopping around you did online, by telephone, or in person.

Base: All to take out each product or service in the last 12 months – June 2020: Car insurance (1,880); Energy (1335); Mortgage (218); Credit card (618); Home insurance (1,644); Mobile phone contract (1,172); Broadband (not bundled) (775); Bundled contract (571); Current account (687); Pay TV (417).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results have not been compared with earlier face-to-face waves as the results are not comparable (see Technical notes).
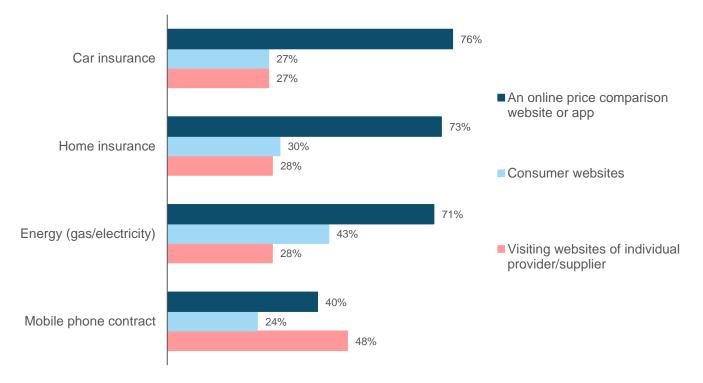
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[5] Figure 10 is based on the whole sample and therefore includes everyone who shopped around, regardless of whether the product was eventually purchased. By contrast, Figure 11 shows the proportion of people who made a purchase who shopped around in advance of this.

How people shop around

In June 2020, the public mainly shopped around by using online price comparison websites or apps, by visiting websites of individual providers or suppliers, and by using consumer websites such as Which? and Moneysavingexpert.com (Figure 12).

Online comparison sites or apps were most commonly used when shopping around for car insurance (76%), home insurance (73%) and energy (71%). Those who shopped around for a mobile phone contract were mostly likely to visit the website of the individual provider or supplier (48%).

Figure 12: How people shopped around for products or services in the last 12 months (among those who shopped around for products or services in the last 12 months), June 2020*

Q92b. Please think about the last time you shopped around for [PRODUCT] in the last 12 months. In which ways did you shop around for [PRODUCT]?

Base: All who shopped around for products or services in the last 12 months – June 2020: Car insurance (1,596); Home insurance (1,275); Energy (1,167); Mobile phone contract (881).

Note: This chart only shows three most popular responses. For the full list of responses, see Table 11.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Why people don't shop around

People who had taken out products without shopping around were asked why they did not shop around for them. The main reasons were because the offer from the provider was just what they wanted (45%) or because they felt loyalty to their provider or had an established relationship with them (25%) (Figure 13; Table 16).

Figure 13: Reasons for purchasing product(s) without shopping around in the last 12 months (based on those who purchased a product without shopping around in the last 12 months), June 2020*

Q93b. You mentioned that you bought the following products without shopping around: [PRODUCTS]. Are there any particular reasons why you took out this/these products without shopping around?

Base: All who purchased a product without shopping around in the last 12 months – June 2020: 1,771.
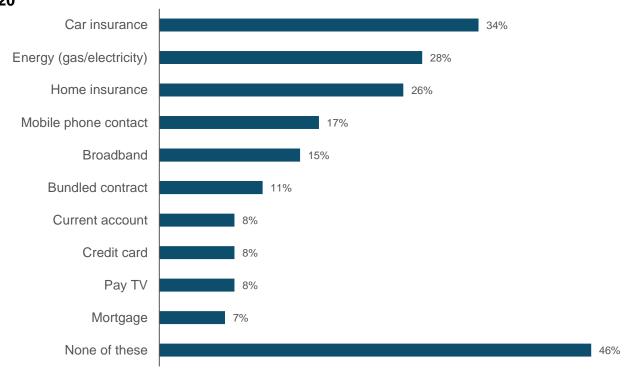
*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Switching

In June 2020, the public were asked questions on switching providers or contracts for different products or services in the last 12 months.[6]

The public were first asked if they were responsible for purchasing a range of products and services, either on their own or jointly. Those that were responsible for purchasing any of these products or services were then asked if they had switched provider or contract for any of these products in the last 12 months. Figure 14 shows the proportion who switched provider or contract for a product or service based only on those who were responsible for purchasing this specific product or service in the last 12 months.

In June 2020, people responsible for each of these products were most likely to have switched provider or contract for car insurance (34%), energy (28%) and home insurance (26%). They were least likely to have switched their mortgage provider or contract (7%).

Figure 14: Whether switched provider or contract for products or services in the last 12 months (among those responsible for purchasing each product and service), June 2020*

Q94b) In the last 12 months, that is since [June 2020], have you switched provider or contract for any of these products or services?
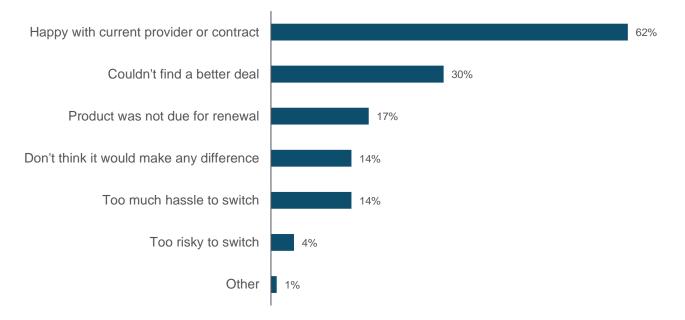
Base: All responsible for purchasing each product or service in the last 12 months – June 2020: Car insurance (2,273); Energy (2,678); Home insurance (2,224); Mobile phone contract (2,512); Broadband (1,693); Bundled contract (1,450); Current account (2,685); Credit card (2,005); Pay TV (1,032); Mortgage (927).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

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[6] The filtering for these questions was changed in June 2020.

Reasons for not switching

The main reason why people did not switch providers or contracts in the last 12 months was because they were happy with their current provider or contract (62%) or because they couldn't find a better deal (30%) (Figure 15). People were least likely to say that it was too risky to switch (4%).

Figure 15: Reasons for not switching provider or contract in the last 12 months (among those who did not switch provider in the last 12 months), June 2020*

Q96b. You said that you have not switched provider for the following products in the last 12 months [PRODUCTS]. Why have you not switched provider or contract for [this product/these products] in the last 12 months?

Base: All who are responsible for purchasing products and services, but have not switched provider in the last 12 months – June 2020: 3,406.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).
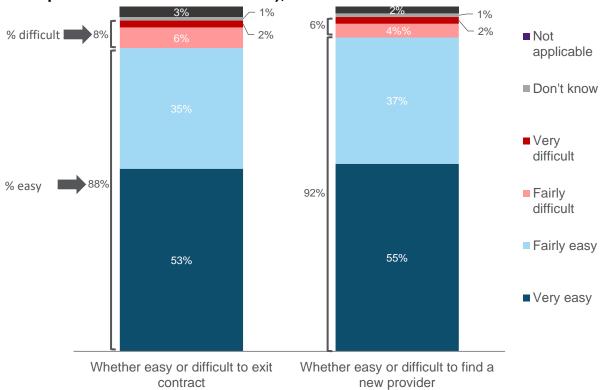
Ease of switching

People who had switched provider or contract for a product or service in the last 12 months were asked:

- How easy or difficult it was to exit the previous contract

- How easy or difficult it was to find a new provider or contract

- Whether they experienced any problems during the switching process once a new provider or contract was selected

In June 2020, the majority of people (88%) found it easy (either very or fairly) to exit their previous contract. Most also found it easy (either very or fairly) to find a new provider or contract (92%) (Figure 16). People rarely experienced problems during the switching process once they selected a new provider or contract, with only 10% saying they experienced a problem (Table 31).

Figure 16: Whether found it easy or difficult to exit the previous contract and whether found it easy to find a new provider or contact since switching (among those who switched provider in the last 12 months), June 2020*

Q97b. You said that you switched the following products in the last 12 months [PRODUCTS] [IF MORE THAN ONE PRODUCT IN THIS LIST: (Thinking about the product that you switched most recently)] How easy or difficult did you find it to exit the previous contract? / Q98b. Still thinking about this product that you switched (most recently). How easy or difficult was it for you to find a new provider or contract?

Base: All who have switched provider in the last 12 months – June 2020: 2,069.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Consumer rights

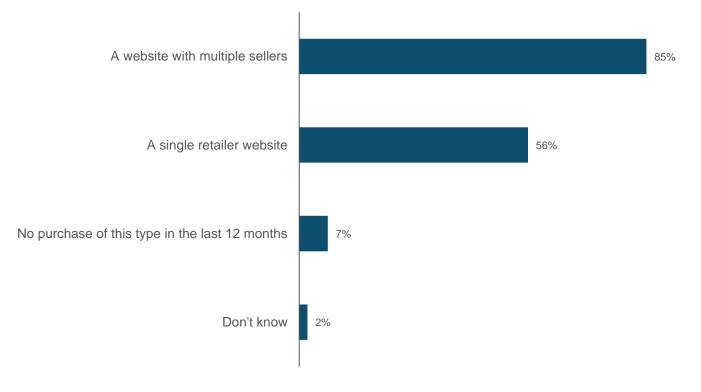### Use of websites and online services

The public were asked if they had purchased anything from two different types of websites in the last 12 months:

- A website with multiple sellers (e.g. Amazon, eBay, Gumtree, Etsy)

- A single retailer website (e.g. a high street retailer website)

It is worth noting that the online sample by nature does not include any respondents who do not use the internet and therefore usage of these sites is higher than we would expect in a face-to-face survey which also includes non-internet users[1].

In June 2020, over eight in ten (85%) had purchased from a website with multiple sellers (Figure 17). Just under six in ten (56%) had purchased from a single retailer website. Less than one in ten (7%) had not purchased from either of these types of website in the last 12 months.

Figure 17: Whether bought anything from multiple or single retailer websites in last 12 months (based on all people), June 2020*
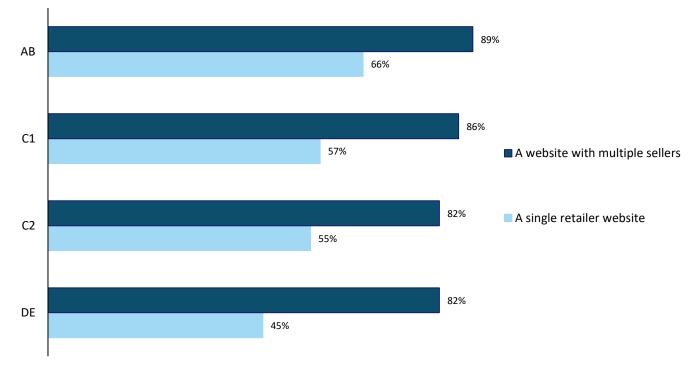

Q110. In the last 12 months, have you bought anything online from the following types of website?
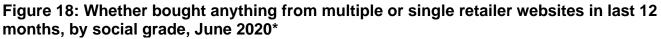
Base: All wave respondents – June 2020: 4,011.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

1. In 2019, within the UK, 91% of all adults had used the internet. Source ONS https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2019#:~:text=In%2 02019%2C%20within%20the%20UK,%25)%20being%20recent%20internet%20users.

People in social grades AB were more likely to have purchased from both multiple retail websites (89%, compared with 82% of those in social grades DE) and a single retailer website (66%, compared with 45% in social grades DE) (Figure 18; Table 32).

Figure 18: Whether bought anything from multiple or single retailer websites in last 12 months, by social grade, June 2020*

Q110. In the last 12 months, have you bought anything online from the following types of website?

Base: All wave respondents in social grades AB (1,259); C1 (1,212); C2 (652); and DE (888).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

The public were also asked whether they had used a range of online services over the last 12 months:

- Social media (e.g. Facebook, Twitter, Instagram)

- Streaming services (e.g. Netflix, Spotify)

- Renting a service from another individual (e.g. Airbnb, Uber)

In June 2020, the public were most likely to use social media (71%), followed by streaming services (55%) and renting services (13%). Around one in ten people (9%) had used all three online services in the last 12 months, while 17% had not used any of these services (Figure 19; Table 33).

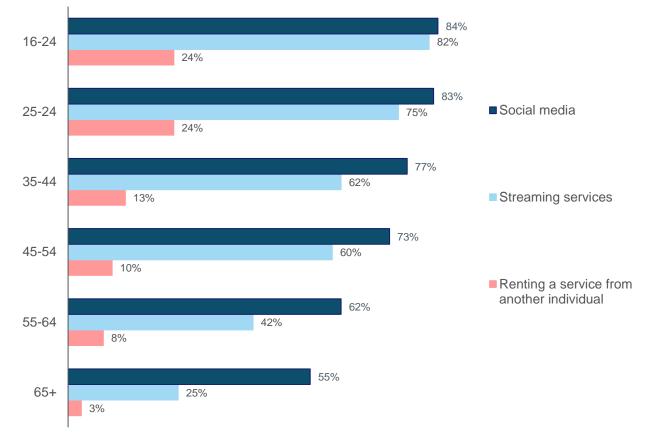**Figure 19: Online services used in last 12 months (based on all people), June 2020***

Q111. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents – June 2020: 4,011

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Those in younger age groups were more likely to use all three online services, with levels of use dropping with age (Figure 20).

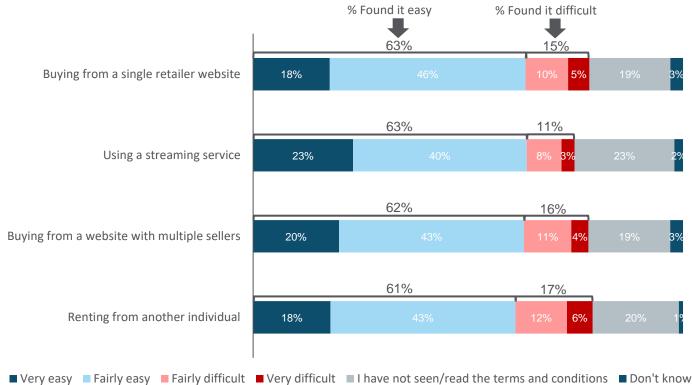## Figure 20: Online services used in last 12 month (based on all people), by age, June 2020*

Q111. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents aged 16-24 (572); 25-34 (703); 35-44 (653); 45-54 (706); 55-64 (628); 65+ (749).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Understanding terms and conditions and privacy notices

Follow-up questions were asked of those who had bought something online or who had used online services (either streaming services or renting a service from another individual) in the last 12 months, to determine how easy or difficult they found it to understand their terms and conditions (Figure 21).

Figure 21: Ease of understanding terms and conditions when purchasing or using services online (among those who have bought anything online, used a streaming service or rented a service in the last 12 months), June 2020*

Q112. Terms and conditions provide customers with additional information regarding the product or service they are purchasing and their rights if something goes wrong. How easy or difficult have you found it to understand the terms and conditions…

Base: All wave respondents to purchase from multiple retailer websites (3,386); single retailer websites (2,229); use streaming services (2,269); rent a service from another individual (530).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

In June 2020, around six in ten thought that it was easy (very or fairly) to understand the terms and conditions for each product or service (Figure 21):

- When you buy from a single retailer website (e.g. a high street retailer website): 63%

- When you use streaming services (e.g. Netflix, Spotify): 63%

- When you buy from a website with multiple sellers (e.g. Amazon, eBay, Gumtree, Etsy): 62%

- When you rent a service from another individual (e.g. Airbnb, Uber, Justpark): 61%

Between 11% and 17% found it difficult (very or fairly) to understand the terms and conditions for all products and services: 17% when renting a service from another individual; 16% when buying from a website with multiple sellers; 15% when buying from a single retailer website; and 11% when using streaming services.

Around two in ten (ranging from 19% for those buying from a website with multiple sellers or those buying from a single retailer website to 23% for those using streaming services) said they had not seen or did not read the terms and conditions.

Those who had used social media in the last 12 months were asked how easy or difficult it was to understand privacy notices for the social media platforms used. Five in ten users (52%) found it easy (very or fairly) to understand privacy notices, while 25% found it difficult (very or fairly) to understand privacy notices. Two in ten users (20%) had not seen or read privacy notices (Table 39).

Social media users aged 16 to 24 were more likely to find it easy to understand privacy notices, while those aged 55 to 64 were least likely to find it easy (62% versus 40%) (Table 39).
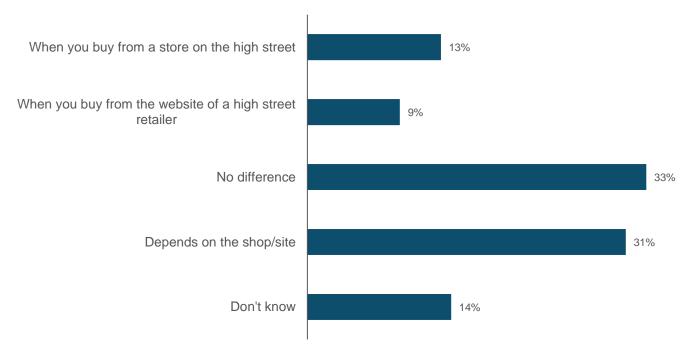
Consumer protection

Consumers have similar protections whether purchasing goods from a high street retailer or a retailer online, although they do have enhanced rights on returns for online purchases.[7] In June 2020, the public were asked who offered the best consumer rights protection when comparing the following:

- A store on the high street vs. the website of a store on the high street

- The website of a store on the high street vs. a private seller online

In June 2020, one in three (33%) thought there was no difference in terms of consumer protection when comparing a high street store vs. a high street website store, while a further 31% said it depends on the shop or site (Figure 22). A slightly higher proportion felt they were offered better protection in terms of their consumer rights when buying from a store on the high street (13%), than when buying from the website of a high street retailer (9%), although this was low for both.

Figure 22: Whether buying from a website of a high street retailer or buying from a store on the high street offers the best protection in terms of consumer rights (based on all people), June 2020*
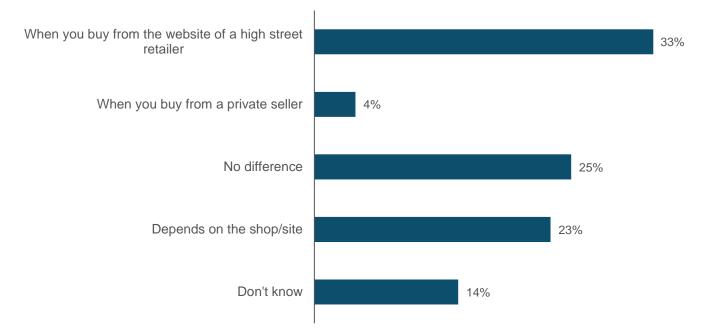

Q114. Which of the following do you think offers the best protection in terms of your consumer rights?

Base: All wave respondents – June 2020: 4,011.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

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[7] Purchases made online can be returned within 14 days as consumers have not had the chance to physically inspect them.

In general, the rights of a consumer are reduced when engaging in a transaction with a private seller, compared with a business online.[8] Consistent with this, in June 2020, the public were far more likely to think that buying from the website of a high street retailer (33%) offered better protection than buying from a private seller online (4%) (Figure 23). A quarter (25%) felt there was no difference.

Figure 23: Whether buying from a website of a high street retailer or buying from a private seller online offers the best protection in terms of consumer rights (based on all people), June 2020*

Q115. Which of the following do you think offers the best protection in terms of your consumer rights?
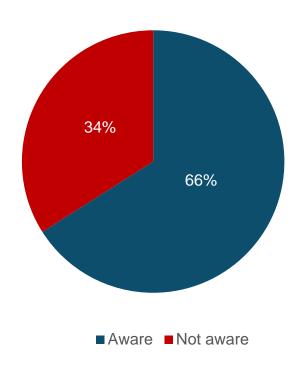
Base: All wave respondents – June 2020: 4,011.

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

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[8] This reduction largely occurs when considering the rights related to the price and quality of the good/service, and the timeliness in which a service is provided. There are also some limited protections in consumer to consumer transactions with regards to redress if a product or service is faulty.

Consumer dispute resolution services

In June 2020, two in three people (66%) were aware of consumer dispute resolution services (Figure 24). Those in older age groups (at least 75% of those 55 and over, compared with 40% of those 16 to 24) were more likely to be aware (Table 42).

Figure 24: Awareness of consumer dispute resolution services (based on all people), June 2020*
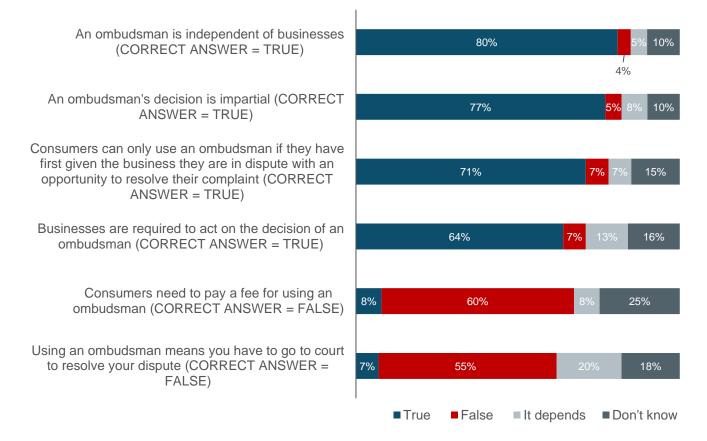

■ Aware ■ Not aware

Q116. I would now like to ask you about consumer dispute resolution services. These are independent organisations which help people resolve a consumer dispute, such as an ombudsman. Before today, had you heard of any of these types of services?

Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

People who were aware of consumer dispute resolution services were presented with six true or false statements on ombudsman services.

The majority were likely to correctly think that an ombudsman is independent of business (80%), that an ombudsman's decision is impartial (77%), that consumers can only use an ombudsman after giving the business they are in dispute with an opportunity to resolve their complaint (71%), and that businesses are required to act on the decision of an ombudsman (64%) (Figure 25). Smaller majorities also correctly thought that you do not need to pay a fee to use an ombudsman (60%) and that using an ombudsman does not mean you have to go to court (55%).

Figure 25: True or false statements about ombudsman services (among those aware of consumer dispute resolution services), June 2020*[9]

Q117. Now some statements about ombudsman services. For each, please tell me whether you think it is true or false.

Base: All aware of consumer dispute resolution services – June 2020 (2,644).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

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[9] The correct answers for each statement are included in brackets.

Only one in five (21%) of those that were aware of consumer dispute services were able to correctly assign all six statements (Table 50). The most likely to give the correct answer for all six statements were aged 35 or above (at least 22%, compared to 4% of those aged 16 to 24).
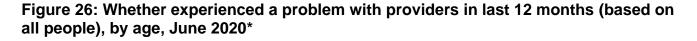
Consumer problems

In June 2020, the public were asked about their experience of consumer problems. A quarter (24%) had experienced a problem with a provider in the last 12 months. However, 6% or less experienced a problem with a specific type of provider. Problems were most commonly experienced with retail or shopping providers (6%), holiday companies or airlines (5%); and broadband providers and energy providers (5%). Just under three quarters of people (73%) had not experienced any problems with providers in the last 12 months (Table 51).
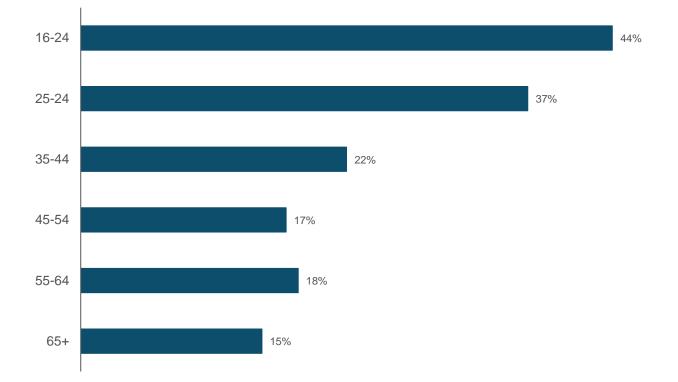
Those who had switched provider for a product or service in the last 12 months were more likely to have experienced a problem with their provider for this product or service in the same period (Table 51). This was particularly apparent for:

- Pay TV providers: 18% of those who had switched their Pay TV provider experienced a problem with them, compared with 2% of those who had not switched.

- Current account providers: 15% of those who had switched their current account experienced a problem with them, compared with 2% of those who had not switched.

- Energy providers: 13% of those who had switched their energy provider experienced a problem with them, compared with 3% of those who had not switched.

It is not clear whether problems were experienced with a current or previous provider. We cannot tell from the data whether problems with providers prompted people to switch, or whether problems were encountered after switching to new suppliers.

Those in younger age groups were more likely than older age groups to experience a problem with a provider in the last 12 months (Figure 26).

Figure 26: Whether experienced a problem with providers in last 12 months (based on all people), by age, June 2020*

Q120. In the last 12 months, that is since [June 2020], have you experienced a problem with any of the following providers, whether or not this was eventually resolved?

Base: All wave respondents aged 16-24 (572); 25-34 (703); 35-44 (653); 45-54 (706); 55-64 (628); 65+ (749).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Trust in consumer organisations

The public were asked how much they trusted each of the following:

- Ofgem

- Energy suppliers

- Price comparison websites

- Consumer groups, including Which? and Money Saving Expert

- Citizens Advice

- Trading standards

- Government websites

Levels of trust (either a lot or a fair amount) were highest for Citizens Advice (81%), consumer groups (79%) and Trading Standards (79%) (Figure 27). All apart from energy suppliers were trusted by more than 50% of the public in June 2020. Just over two in ten people (22%) said they did not know how much they trusted Ofgem, probably indicating a lower awareness about them compared with the other organisations and services. Levels of trust were lowest for energy suppliers. Four in ten (41%) people trusted energy suppliers a lot or a fair amount, but almost half (48%) said they did not trust them very much or at all.
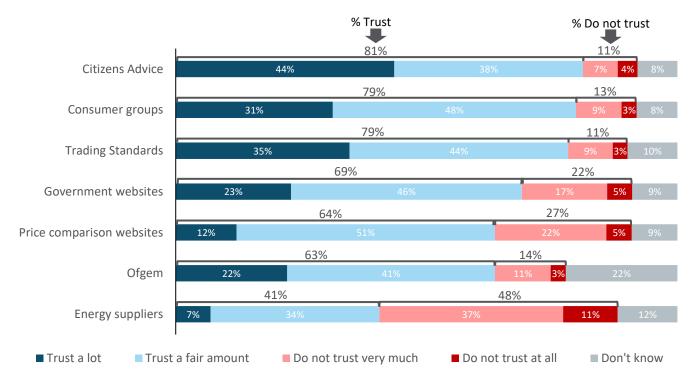
Figure 27: Trust in consumer organisations (based on all people), June 2020*

Q130. How much, if at all, do you trust the following to give you impartial information?
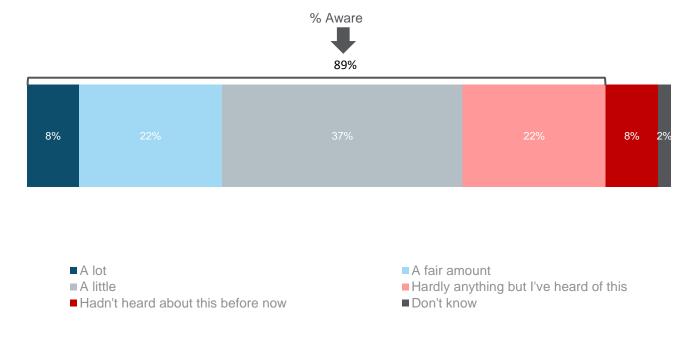
Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Artificial intelligence

Awareness of artificial intelligence

In June 2020, nine in ten people (89%) said they had heard of artificial intelligence (AI), with 8% having never previously heard of this. Under one in ten (8%) said they had heard or read a lot about AI, 22% a fair amount and 37% a little (Figure 28). A further 22% said they had heard of AI but knew nothing more than this.

Figure 28 How much read or heard about artificial intelligence (based on all people), June 2020*

% Aware

89%

| 8% | 22% | 37% | 22% | 8% | 2% |

- ■ A lot
- ■ A fair amount
- ■ A little
- ■ Hardly anything but I've heard of this
- ■ Hadn't heard about this before now
- ■ Don't know

Q210. Before today, how much, if anything, have you heard or read about artificial intelligence, otherwise known as 'AI'?

Bases: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).
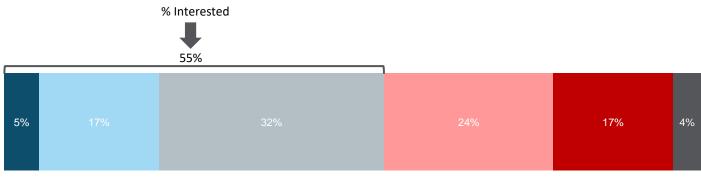
There were differences based on social grade. Over nine in ten (94%) of those in social grades AB had heard of AI, compared with between 86% and 89% across all other social grades. Furthermore, just under four in ten (37%) of those in social grades AB said they knew a lot or a fair amount, compared with 26% of those in social grades DE (Table 60).

Men were also more likely to have heard or read greater amounts about AI (39% of men said they had heard or read a lot or a fair amount about AI, compared with 22% of women) (Table 60).

Interest in artificial intelligence

In June 2020, 55% of people said they were interested in AI. Just under a quarter (23%) said they were very interested. This comprised 5% who actively seek out information about future developments, and 17% who take an interest in news stories or articles about future developments. A further 32% said they were interested in AI but unlikely to make a special effort to keep informed. A quarter (24%) said they were not particularly interested in AI, with a further 17% saying they were not at all interested in this (Figure 29).

Figure 29: Level of interest in artificial intelligence (based on all people), June 2020*

% Interested

55%

5%	17%	32%	24%	17%	4%

■ Very interested and will actively seek out information about future developments
■ Very interested and will take an interest in news stories or articles about future developments
■ Interested but unlikely to make a special effort to keep informed
■ Not particularly interested
■ Not at all interested
■ Don't know

Q211. Which of these statements best describes your level of interest in artificial intelligence?

Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

As might be expected, there was a relationship between interest in AI and how much people had previously heard or read about it. Eight in ten (81%) of those who said they had heard or read a lot or a fair amount about AI said they were interested in it. This compares with 57% of those who had heard or read a little about AI, 32% of those who had heard or read hardly anything about it, and 20% of those who had never previously heard about AI (Table 61).

Those most likely to be interested in AI included men (63%, compared with 47% of women); those aged 16 to 24 (68%, compared with 45% of those aged 65 and over); and those in social grades AB (64%, compared with 48% of those in social grades DE) (Table 61).

Perceptions of artificial intelligence

In June 2020, 28% of people said they were positive about AI, while two in ten (20%) felt negative about it. A greater number of people said they were neither positive nor negative (44%), with a further 8% saying they did not know (Figure 30).

People were more likely to be positive about AI if they had greater awareness of it (Figure 30). Among those who had heard or read a lot about AI, 28% were very positive about it and 35% were fairly positive. Those with lower levels of awareness of AI were far more likely to either

say they felt neither positive or negative about it or that they did not know (Figure 30; Table 212).
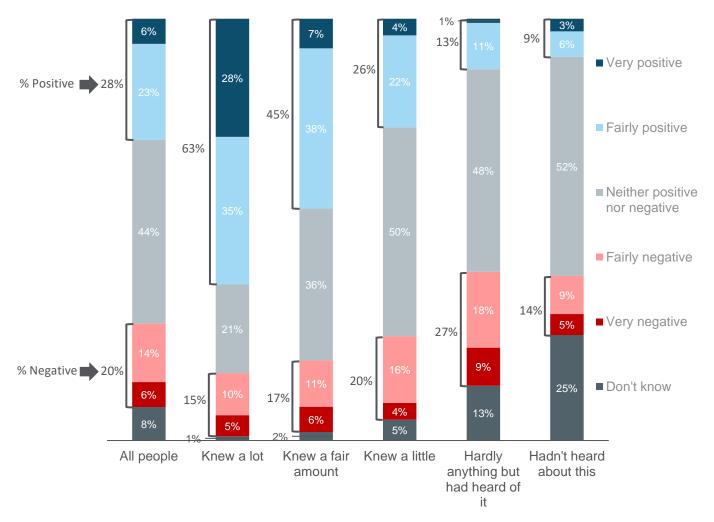
Figure 30 How positive or negative people feel about the impact of increasing use of artificial intelligence in the UK (based on all people), by awareness of AI, June 2020*

Q212. Overall, how positive or negative do you feel about the impact of increasing use of artificial intelligence in the UK? / Q210. Before today, how much, if anything, have you heard or read about artificial intelligence, otherwise known as 'AI'?

Base for 'All people' bar: All wave respondents – June 2020 (4,011).

Bases for other bars: A lot (334); A fair amount (924); A little (1,471); Hardly anything but heard of it (870); Hadn't heard about this (280).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Those more likely to view the impact of AI as positive included men (37%, compared with 20% of women), those aged 16 to 24 (40%, compared with 20% of those aged 65 and over) and those in social grades AB (33%, compared with 22% of those in social grades DE) (Table 61).
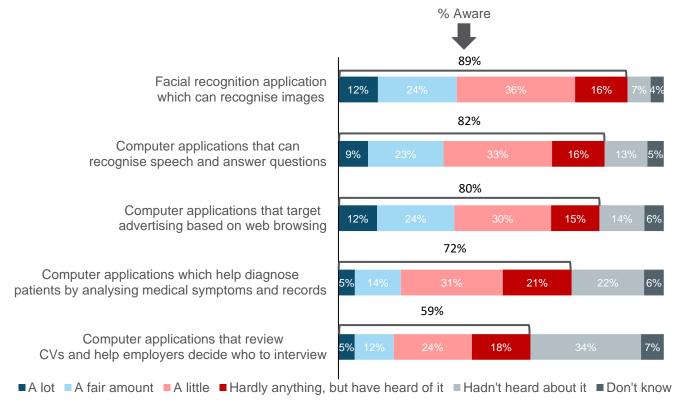
Applications of artificial intelligence

All people interviewed in June 2020 were asked questions about five applications of AI:

- Computer applications that can recognise speech and answer questions

- Facial recognition applications which can recognise images

- Computer applications that target advertising based on web browsing

- Computer applications which help diagnose patients by analysing medical symptoms and records

- Computer applications that review CVs and help employers decide who to interview.

For each application, people were first asked how much they had heard or read about it and then asked the extent to which they supported or opposed each application.

The applications with the highest levels of awareness were: facial recognition applications which can recognise images (89%), computer applications that can recognise speech and answer questions (82%), and computer applications that target advertising based on web browsing (80%). Levels of awareness were lower for computer applications which help diagnose patients by analysing medical symptoms and records (72%) and computer applications that review CVs and help employers decide who to interview (59%) (Figure 31).

Figure 31: How much heard or read about different applications of AI, June 2020*

Q213. Before today, how much, if anything, have you heard or read about the following applications of artificial intelligence?

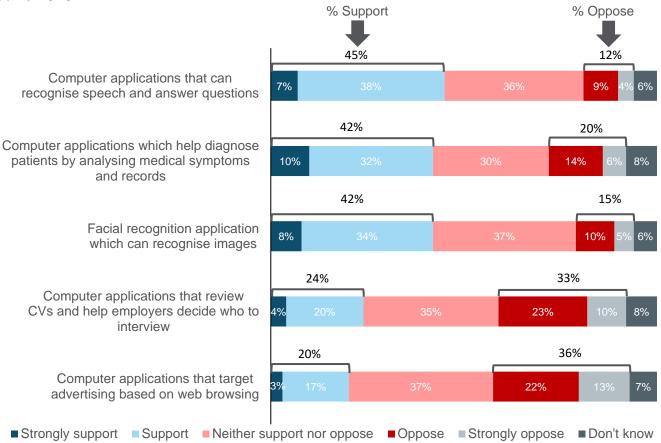Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

For three of the applications, people were more likely to support than oppose them: computer applications that can recognise speech and answer questions (45% supported and 12% opposed), computer applications which help diagnose patients by analysing medical symptoms and records (42% supported and 20% opposed), and facial recognition applications which can recognise images (42% supported and 15% opposed).

By contrast, people were more likely to oppose than support the use of computer applications that target advertising based on web browsing (36% opposed and 20% supported) and computer applications that review CVs and help employers decide who to interview (33% opposed and 24% supported).

For all five applications of AI, between 30% and 37% said they neither supported nor opposed its use. This response was more common among those who were previously unaware of AI (Figure 32).

Figure 32: Whether support or oppose different applications of AI (based on all adults), June 2020*

Q214. And to what extent do you support or oppose each of the following applications of artificial intelligence?

Base: All wave respondents – June 2020 (4,011).

*All questions are based on the surveys carried out on Kantar's online omnibus in June 2020 and/or March 2020. Results are not comparable with earlier face to face waves, so no such comparisons are made in this report (see Technical Notes).

Technical information

Technical notes

This report provides selected headline findings and highlights statistically significant differences at the 95% level for two waves where the Kantar online omnibus was used:

- Wave 34 (June 2020)

- Wave 33 (March 2020)

Statistically significant differences at the 95% level are also made between subgroups for wave 34.

Percentages included on charts in this report may not add up to 100% due to rounding, the exclusion of some categories (e.g. 'Don't know' and 'Refused') and the option for more than one response to be selected at some questions. Similarly, percentages based on aggregating categories (for example 'strongly support' and 'support') may not always reflect the sum of the individual answer categories.

This report is not an exhaustive overview of the findings. Please refer to the accompanying Excel dataset and PDF/Excel cross tabulation tables for the current wave, along with the wave 33 (web) Excel dataset to see full responses to all survey questions.

Until March 2020 (wave 33) the survey was conducted using in-home interviews conducted via the Kantar UK face-to-face Omnibus. However, fieldwork in March 2020 stopped early due to the outbreak of Coronavirus (COVID-19) in the UK, and the associated lockdown measures. The findings from wave 33, based on a truncated face-to-face sample, were published in May 2020.[10] A parallel version of wave 33 was also conducted by web on the Kantar online omnibus. The purpose of this was to test and compare alternative methodologies with a view to deciding on the best approach for future waves, while lockdown restrictions remain in place.

At the point of publication, face-to-face survey fieldwork largely remains paused in the UK. Therefore, data for wave 34 were also collected using the Kantar online omnibus. Web-based fieldwork ran from 4 June and 9 June with a representative sample of 4,011 adults (16 and over) in the UK.

The Kantar online omnibus primarily uses the Kantar online access panel as the sample source. The Kantar panel is part of an association of quality-conscious panel providers that work together to fulfil sample requirements that cannot be met by a single provider within the required timescales. For this survey the Kantar panel was supplemented with Lucid, which has been vetted by Kantar as reputable and offering high-quality sample. The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Quotas were set by age and gender and the sample was pre-stratified by region. Data were weighted for the following characteristics: sex, age, social grade, region, tenure, property type, main way the property is heated and whether there is someone with a long-

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[10] The March 2020 (wave 33) report can be found here:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/884028/BEIS_PAT_W33_-_Key_findings_Final_.pdf

standing illness or disability in the household. Results included here are based on data which have been weighted to reflect the UK population aged 16+.

Using online access panels to source sample brings a number of benefits. These include allowing for data collection while social distancing measures are in place, speed, cost-efficiency, and in helping to minimise social desirability bias (as there is no interviewer present). However, it is important to flag that there are some potential downsides to this approach as well:

- There is a risk that online panellists are not representative of the general population:

    - People volunteer to join online access panels and this approach may therefore be particularly prone to self-selection bias

    - Online panel surveys exclude the off-line population

With this type of sample, the accuracy of estimates is conditional on the assumption that the combined effects of sampling, fieldwork protocols, quota application, and weighting have successfully eradicated biasing selection effects on the data. However, this assumption is untestable without substantial – and impractical – expenditure on collecting benchmark data using a random probability sampling approach.

The steps we have taken to minimise the risk of bias are as follows:

- The panel uses a diverse set of recruitment sources and a variety of recruitment methods. This includes opt-in email, co-registration, e-newsletter campaigns, and traditional banner placements.

- The sample was stratified by region before it was drawn. This helped to ensure that the final sample reflected, as far as possible, the regional profile of the general population.

- Quotas were set to compensate for known biases in online panels. Younger people and men are generally under-represented on online panels, so we set an interlocking quota by age and gender.

- Weighting was applied to ensure that the demographic profile of our sample matched the profile of the general population.

The weighting matrix for the face-to-face surveys includes age by gender, region, social grade, and housing tenure. With this standard weighting applied there remained some large differences between the profile of the online sample and the profile recently achieved using face-to-face data collection. For this reason, it was decided to add the following variables to the weighting matrix – property type, main way the property is heated and whether there is someone with a long-standing illness or disability in the household. The online sample was weighted to match the profile achieved in recent waves of the face-to-face survey.

The variables included in the weighting matrix (and the source of the benchmark statistics) were as follows:

- Age by Gender - ONS Mid-Year Population Estimates 2019

- Region (former Government Office Region) - ONS Mid-Year Population Estimates 2019

- Social Grade – Kantar TGI (Jan 19 - Dec 19)

- Housing tenure – ONS Annual Population Survey (Jan 19 - Dec 19)

- Property type (waves 30 to 33 of the face-to-face PAT survey)

- Main way property is heated (waves 30 to 33 of the face-to-face PAT survey)

- Long-standing illness or disability in the household (waves 30 to 33 of the face-to-face PAT survey)

It should be noted that the weighting only corrects for observed bias (for the set of variables included in the weighting matrix) and there is a risk of unobserved bias. Furthermore, the raking algorithm used for the weighting only ensures that the sample margins match the population margins. There is no guarantee that the weights will correct for bias in the relationship between the variables.

Comparisons with previous waves using face-to-face data collection.

It should be noted that any change in methodology can lead to both selection effects (that is differences due to the different sampling methods employed) and measurement effects (that is differences due to the different interview modes). Although attempts have been made to reduce the selection effects between the online and face-to-face approaches, the online results from wave 34 and wave 33 should not be directly compared with face-to-face results from previous waves. For this reason, we have not made any direct comparisons with longer-term tracking measures collected via the original face-to-face surveys.

When it comes to **measurement effects**, differences in results could be caused by a number of factors (see below). Measurement effects cannot be ameliorated by weighting, although it is sometimes possible to estimate their direction and scale and (at least partially) account for them in analysis.

Some examples of measurement effects:

- Face-to-face and telephone interviewers can provide motivation or clarification when required; this cannot truly be replicated online.

- People who would not disclose sensitive personal information or socially undesirable opinions/behaviours to an interviewer may be more willing to provide this information online.

- Where a response scale is used (e.g. running from "strongly agree" to "strongly disagree"), interview respondents are generally more likely to select a 'strong' response – at either end of the scale – than they would if they were completing the survey online.

- For logistical reasons, the questionnaire has to be adapted slightly for each mode and this can affect measurement:

  - Long questions or response lists are not suitable for smartphone presentation and will need to be edited in some cases.

  - Unprompted questions ('do not show screen') have to be converted into prompted versions for online presentation which will limit compatibility.

  - Presentation of "don't know" answer codes: In CAPI and CATI these are usually collected as spontaneous codes, i.e. the interviewer will only select these if the respondent mentions it. However, on CAWI these codes have to be available

more obviously for respondents (though they can be 'hidden' in the initial presentation).

While an attempt was made to adapt the existing PAT questions for a CAWI setting, inevitably some of the differences outlined above remained.

It should also be noted that fieldwork for the two online waves took place during the COVID-19 lockdown period, so it is unclear what effect the COVID-19 outbreak and associated media coverage during fieldwork may have had on public behaviours, attitudes and perceptions towards the topics in this report. This is a further reason why comparisons with earlier face-to-face waves should be avoided.

Fieldwork dates and sample sizes

Wave	Fieldwork dates	Sample sizes
Wave 1 (Mar 2012)	21 to 25 March 2012	2,121
Wave 2 (Jun 2012)	27 June to 1 July 2012	2,100
Wave 3 (Sep 2012)	26 to 30 September 2012	2,118
Wave 4 (Dec 2012)	12 December 2012 to 2 January 2013	2,107
Wave 5 (Mar 2013)	27 to 31 March 2013	2,051
Wave 6 (Jul 2013)	3 to 7 July 2013	2,124
Wave 7 (Sep 2013)	25 to 29 September 2013	2,103
Wave 8 (Dec 2013)	11 to 15 December 2013	2,110
Wave 9 (Mar 2014)	26 to 30 March 2014	2,040
Wave 10 (Jun 2014)	25 to 29 June 2014	2,087
Wave 11 (Sep 2014)	24 to 28 September 2014	2,103
Wave 12 (Dec 2014)	10 December 2014 to 8 January 2015	2,119
Wave 13 (Mar 2015)	18 to 29 March 2015	1,981
Wave 14 (Jun 2015)	24 to 28 June 2015	2,118
Wave 15 (Sep 2015)	23 to 27 September 2015	2,121
Wave 16 (Dec 2015)	9 to 13 December 2015	2,121
Wave 17 (Mar 2016)	23 to 27 March 2016	2,105
Wave 18 (Jun 2016)	29 June to 3 July 2016	2,114

Wave 19 (Sep 2016)	28 September to 2 October 2016	2,080
Wave 20 (Dec 2016)	14 to 18 December 2016	2,138
Wave 21 (Mar 2017)	29 March to 2 April 2017	2,180
Wave 22 (Jun 2017)	30 June to 4 July 2017	2,097
Wave 23 (Sep 2017)	27 September to 1 October 2017	2,105
Wave 24 (Dec 2017)	13 to 17 December 2017	2,078
Wave 25 (Mar 2018)	28 March to 6 April 2018	2,102
Wave 26 (Jul 2018)	11 to 17 July 2018	4,268[11]
Wave 27 (Sep 2018)	19 to 30 September 2018	4,258
Wave 28 (Dec 2018)	5 to 16 December 2018	4,273
Wave 29 (Mar 2019)	13 to 24 March 2019	4,224
Wave 30 (Jun 2019)	5 to 16 June 2019	4,231
Wave 31 (Sep 2019)	11 to 22 September 2019	4,201
Wave 32 (Dec 2019)	4 to 22 December 2019	4,212
Wave 33 (Mar 2020)	11 to 17 March 2020	1,851
Wave 33 CAWI (Mar 2020)	3 April to 7 April	2,544
Wave 34 CAWI (Jun 2020)	4 June to 9 June 2020	4,011

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[11] The sample size increased to c. 4,200 from Wave 26 (July 2018) onwards to allow greater scope for regional analysis.

Definitions

Artificial intelligence	Technologies with the ability to perform tasks that would otherwise require human intelligence, such as visual perception, speech recognition, and language translation.
Base	The number of people answering a survey question.
CAWI	Computer-assisted web interviewing.
Climate change	Long-term shift in the planet's weather patterns and rising average global temperatures.
Cognitive testing	An in-depth interviewing method to determine the reliability and validity of survey questions.
Consumer dispute resolution services	Independent organisations which help people resolve a consumer dispute, such as an ombudsman.
Energy infrastructure	A term used to capture a range of different energy sources that are covered by the survey and the interconnections between them. This includes a range of renewable sources (on-shore and off-shore wind, solar, wave and tidal, and biomass), nuclear, shale gas, and carbon capture and storage as well as the pipeline and other interconnectors between them.
Fieldwork	The period where face-to-face or online interviews are conducted.
Net Zero	Net zero means that the UK's total greenhouse gas (GHG) emissions would be equal to or less than the emissions the UK removed from the environment. This can be achieved by a combination of emission reduction and emission removal. The new Net Zero target was announced by the government in June 2019, which requires the UK to bring all greenhouse gas emissions to net zero by 2050.
Omnibus survey	A method of quantitative survey research where data on a wide variety of subjects submitted by a range of funders is collected during the same interview.
Privacy notices	Information provided by a service provider to inform users how they will use their personal information.
Quotas	A target number of interviews for a certain characteristic during survey fieldwork (e.g. age).
Random location quota sampling	A form of quota sampling that combines elements of random sampling and quota sampling. Once a random sample is drawn, interviewers are tasked with interviewing a range of sub-groups across different timing patterns based on a pre-agreed number of respondents.
Representativeness	Similarity of the sample profile to benchmark population statistics, such as the Office for National Statistics mid-year population estimates.
Sample size	The number of people included in the sample (a subset of the population).

Shale gas and fracking	Shale gas is natural gas found in shale, a non-porous rock which does not allow the gas to escape. Hydraulic fracturing or "fracking" is a process of pumping water at high pressure into shale to create narrow fractures which allow the gas to be released and captured. The gas can then be used for electricity and heating.
Shopping around	Comparing different products, services, deals or providers.
Social grade	Social grade is a classification system based on occupation. It contains the following categories: A: Higher managerial, administrative and professional B: Intermediate managerial, administrative and professional C1: Supervisory, clerical and junior managerial, administrative and professional C2: Skilled manual workers D: Semi-skilled and unskilled manual workers E: State pensioners, casual and lowest grade workers, unemployed with state benefits only
Statistical significance	A statistical test to determine whether relationships observed between two survey variables are likely to exist in the population from which the sample is drawn. We only report on findings that are statistically significant at the 95% level.
Survey outputs	The key deliverables from the survey. This includes: A key finding report, presenting summary headline findings from September 2019. Summary tables (Excel), showing trends across all waves of the tracker. An Excel dataset containing questionnaire variables, demographic variables and derived variables for further analysis. An SPSS version of the dataset is available upon request. Excel label data (CSV), containing labels for all variables. Excel numeric data (CSV), containing numeric values for all variables. Cross tabulation tables (PDF and Excel) for the current wave, including demographic and key question sub-group comparisons for all questions.
Switching	Changing provider or contract for products or services.
Terms and conditions	The rules a consumer must abide by to use a service or purchase a product.

Weighting	An adjustment made to the data to ensure that survey results are representative of the target population (in this case, all UK adults).

Further information

Future updates to these statistics

Results from the Public Attitudes Tracker are published quarterly. The next release is scheduled to be published on 5 November 2020. Note that not all Tracker questions are included in each wave.

Revisions policy

The BEIS statistical revisions policy sets out the revisions policy for these statistics, which has been developed in accordance with the UK Statistics Authority Code of Practice for Statistics.

Related Statistics

There are various other surveys which seek the general public's opinion on topics related to those covered by the BEIS Public Attitudes Tracker. These include:

Public Attitudes to Science

A collection of studies looking at the UK public's attitudes to science, scientists and science policy.

Public attitudes towards transport

The department for transport publishes a wide range of reports on the public's attitude to various modes of transport.

Biannual Public Attitudes Tracker - Food Standards Agency

This survey monitors changes in consumer attitudes to food-related issues in England, Wales and Northern Ireland.

The English Housing Survey

The English Housing Survey is a continuous national survey commissioned by the Ministry of Housing, Communities and Local Government (MHCLG). It collects information about people's housing circumstances and the condition and energy efficiency of housing in England. There are some waves of the PAT which cover similar topics such as the number of households with condensing boilers.

BEIS also publishes a wealth of energy statistics which provide context for the attitude data collected by the PAT. These are available on the Statistics at BEIS website.

Uses of these statistics

These statistics are used by BEIS to guide BEIS policy, by many academics in their related studies, by ministers and by the general public. Some examples on the uses of previous waves of the PAT include

- Monitoring attitudes towards fracking by policy makers, the media and local groups to understand how this is changing over time and the reasons why people support or oppose it.

- Understanding public awareness of key BEIS policies such as Net Zero.

- Monitoring public attitudes to climate change and government policies associated with this and understanding how concern varies between demographic groups.

- Understanding public acceptability of different renewable energy sources which contribute to the government's aim to reduce the dependence on fossil fuels.

User engagement

Users are encouraged to provide comments and feedback on how these statistics are used and how well they meet user needs. Comments on any issues relating to this statistical release are welcomed and should be sent to: BEISPAT@beis.gov.uk.

The BEIS statement on statistical public engagement and data standards sets out the department's commitments on public engagement and data standards as outlined by the Code of Practice for Statistics.

Pre-release access to statistics

Some ministers and officials receive access to these statistics up to 24 hours before release. Details of the arrangements for doing this and a list of the ministers and officials that receive pre-release access to these statistics can be found in the BEIS statement of compliance with the Pre-Release Access to Official Statistics Order 2008.

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